

MILWAUKEE COUNTY  
REGISTER IN PROBATE OFFICE

**APPROVAL OF ACCOUNTS BEFORE THE COURT**

If it is appropriate for you to request a hearing before the judge for approval of the annual accounting report and prior to filing the applicable petition, you should be familiar with the applicable law and be prepared to litigate this matter pro se or with privately retained legal counsel.

To help you get started, we have prepared a list of basic instructions for bringing such an action. Each case is different, and may require additional documentation. The following list is intended to supply you with only a generic procedural roadmap. The forms listed below are available in the Office of the Register in Probate, 901 N. 9th Street, Rm 207, Milwaukee, Wisconsin 53233 or at [www.wicourts.gov](http://www.wicourts.gov) and at [www.milwaukeecounty.org/CourtServices7714/ProbateHomePage/LocalForms.htm](http://www.milwaukeecounty.org/CourtServices7714/ProbateHomePage/LocalForms.htm).

1. Submit one (1) original and two (2) copies of the following paperwork (in person or by mail\*): Order and Notice of Hearing on Petition for Approval of Account of Guardian or Conservator, and Petition for Approval of Account of Guardian or Conservator. \*If mailing, a self-addressed stamped envelope must be included.
2. Notice all interested persons by providing each interested person and the bond agency a copy of each the Petition and the Order/Notice, which were previously filed with the court (see #1 above). Notice must be according to the rules set forth in section 54.38(2) of the Wisconsin Statutes.
3. Prepare an Affidavit of Service (GN-3120) listing the names and addresses of all interested persons with the date they were mailed notice. Complete the Affidavit and then sign the document in front of a Notary Public.
4. Prepare and bring one (1) original and two (2) copies of the following to the court hearing: Order on Petition for Approval of Account of Guardian or Conservator, Affidavit of Service (with signature and stamp of a Notary Public), All relevant accounting documents, including but not limited to, verification of assets, proof of disbursements, current real estate and tax bills, prior year federal/state taxes and any other documents.

If you determine it is appropriate to request the Court to approve the accountings then the instructions listed above are to help you. It is your decision to petition the Court and it will be your legal burden to show that approval of the accountings is in the best interest of the ward. You should investigate and be prepared to testify as to whether the accountings were filed in good faith and to the best of your ability. There are many additional issues to consider and it is your duty as the petitioner in the action to be properly advised on the law.

The staff in the probate office cannot give you legal advice on the substance of your petition or the specific area of law. We will, as always, help you with any procedural questions that do not require giving legal advice.